James River Partnership

" To Foster Navigational, Economic, and Environmental cooperation and stewardship of the James River Navigation Channel"

Presented by:
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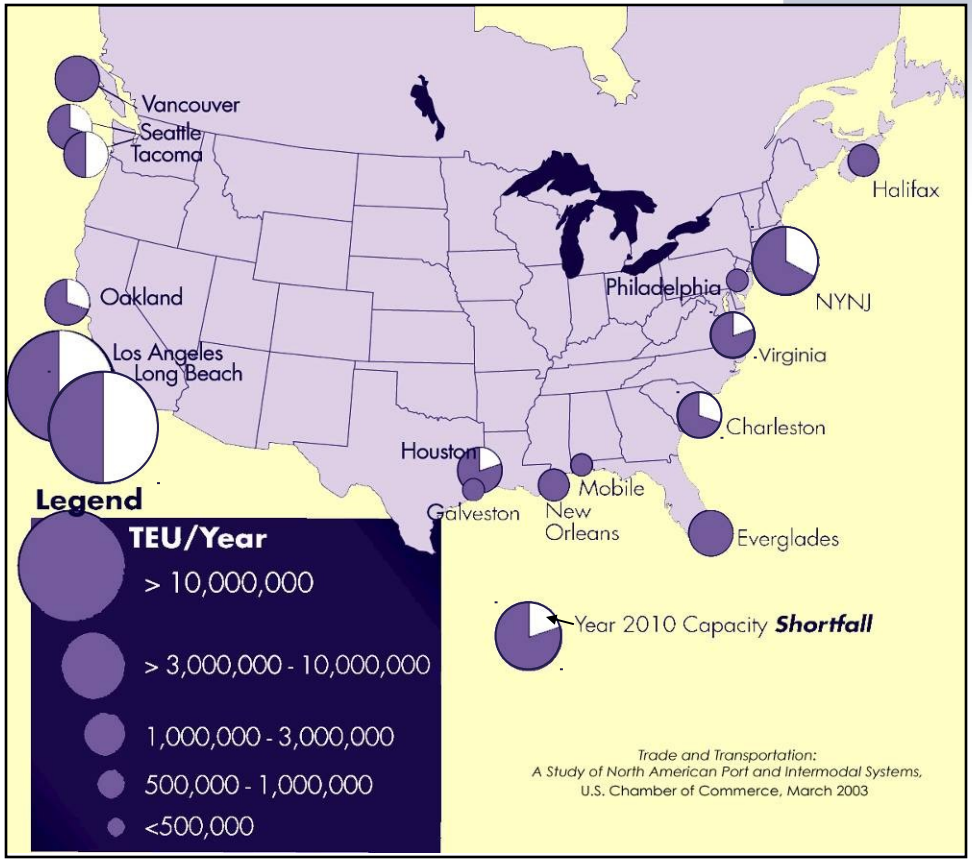
Deputy Executive Director
Virginia Port Authority

Agenda

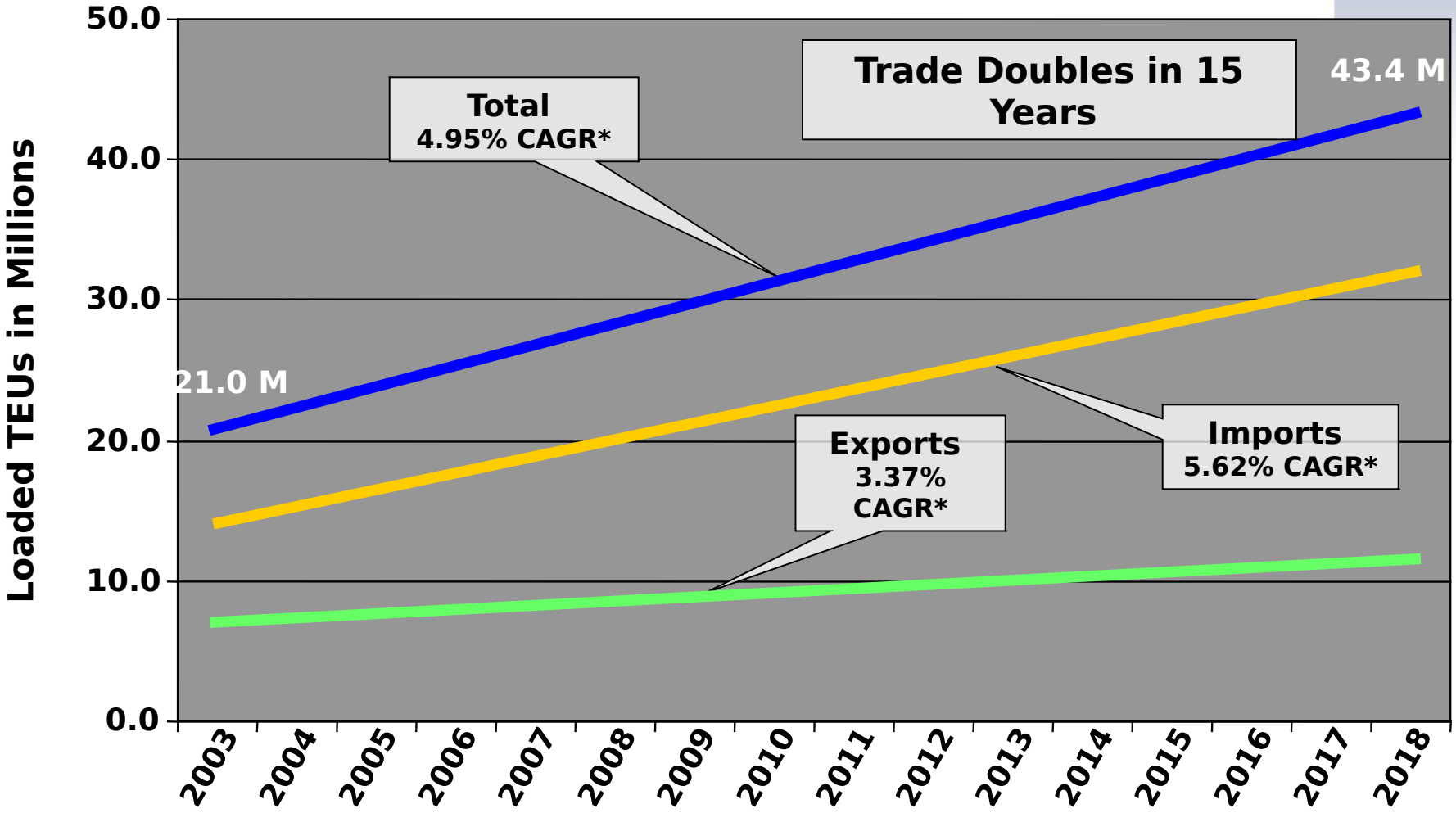
- **National Cargo Trends**
- **Port of Virginia Trends**
- **APM/Maersk Terminal Update**
- **Craney Island Marine Terminal Status Update**
- **James River Trade and Efforts**

National Cargo Trends

- **U.S. Cargo Will Double in Volume by 2020**
- **Panama Canal Commission Forecast East Coast Cargo to Triple by 2020**
- **Latin American Trade and Transportation Study (2001)**
  - **13 Southern US States Will Reach Capacity Between 2008 and 2012**



U.S. Containerized Trade Forecast – 2003-2018



Source: Global Insight, Inc.

* Compound Annual Growth Rate

National Cargo Forecasts

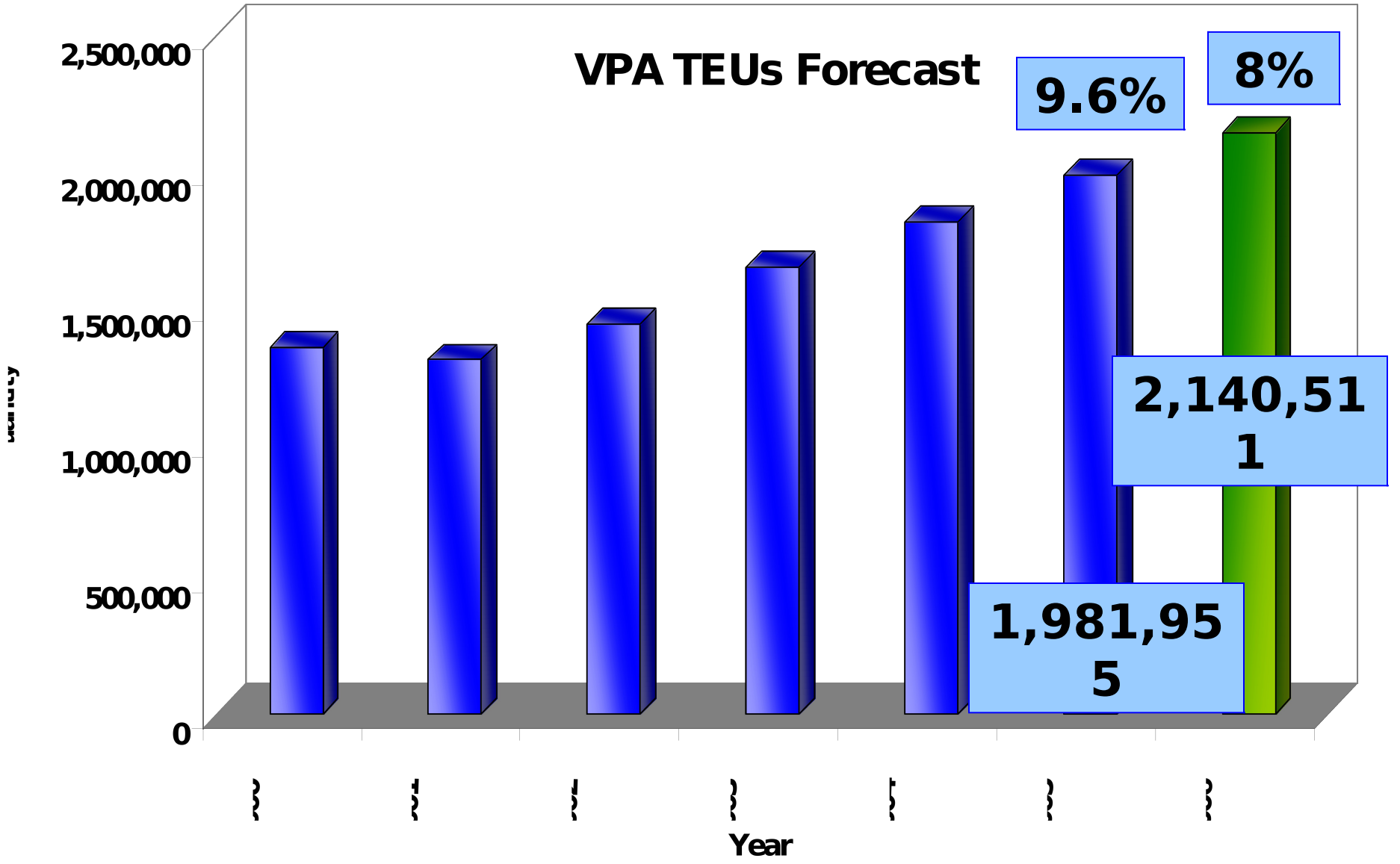
- **All Cargo Growth Forecasts are Based on "Unconstrained" Growth**
- **Port Capacity and Transportation Are Potential Constraints to Growth**
  - **Aging or Inadequate Terminal Facilities Cannot Accommodate Additional Cargo**
  - **Congested or Unreliable Road and Rail Transportation Networks Hinder the Inland Movement of Cargo**

Port of Virginia
Calendar YTD Performance
January - December 2005

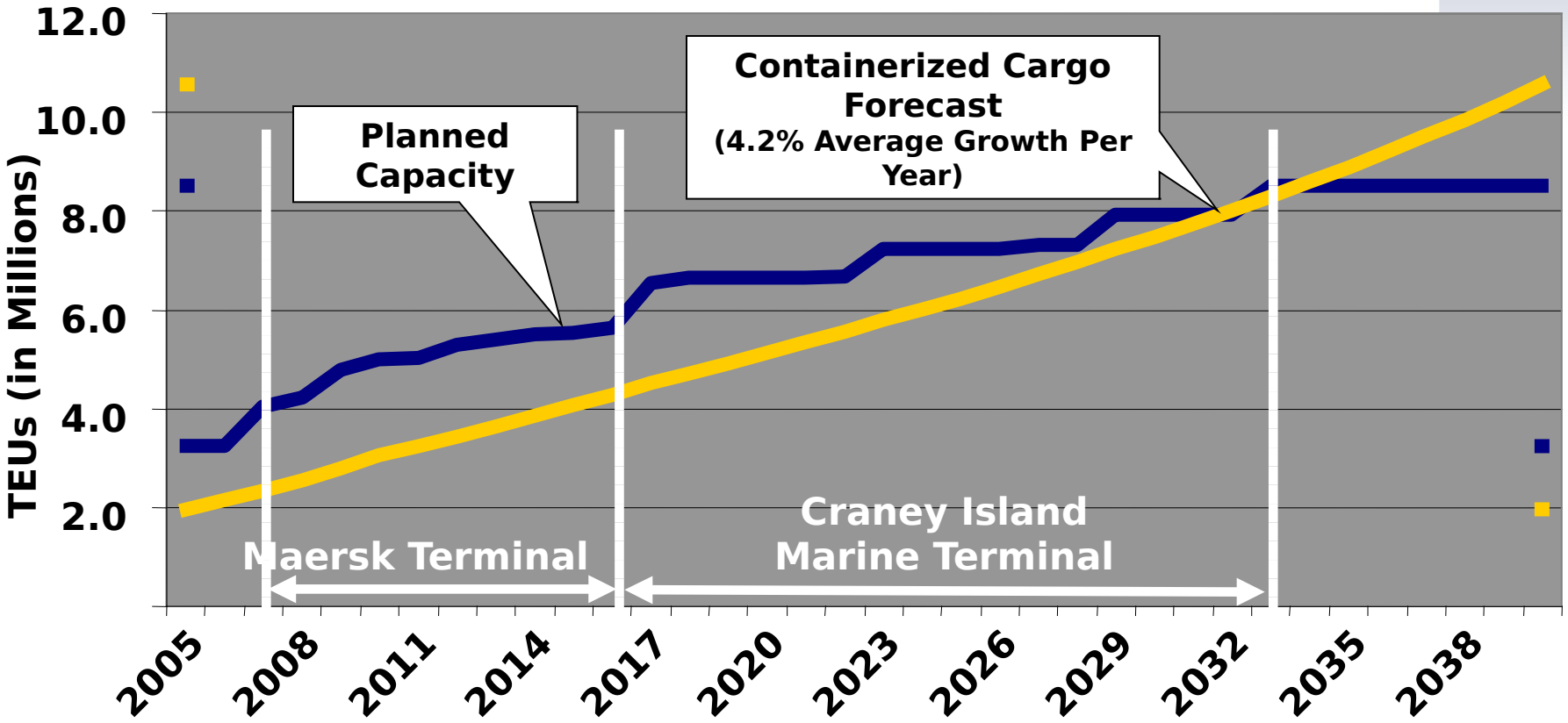
	CY04	CY05	%Increase
TEUS	1,808,933	1,981,955	+9.6%
Ship Calls	2,178	2,104	+3.5%
Breakbulk*	584,863	498,745	-14.7%

*Unit of measurement: tons Source: Terminal Statistics Jan – Dec 2005

Calendar 2006 Projections



Projected Cargo Demand & Planned Capacity



Source: VPA Master Plan. Forecast numbers prepared in 2005 and represent average increase over the forecast period.

APM/Maersk Terminal

- **$450 Million Investment**
- **Open 2007 (Stage 1)**
- **Complete 2009**
- **Handle 2.1 M TEUs Per Year**

Craney Island

- **Craney Island Marine Terminal is the Future of The Port**
- **At Build-Out, CIMT Will More Than Double The Port's Capacity**
- **$2.2 Billion Construction Cost**
- **Feasibility Study In Progress by the VPA & the U.S. Army Corps of Engineers**

Craney Island Status Update

Milestone	Date
Final Feasibility Report Package Submitted to NAD for Review & Approval	**January 27, 2006**
Presentation by District Engineer to Civil Works Review Board	**April 4, 2006**
Final EIS Distributed for State & Agency Review / EIS Filed for Federal Register Publication	**May 2006**
Comments Due from State & Agency Review	**June 2006**

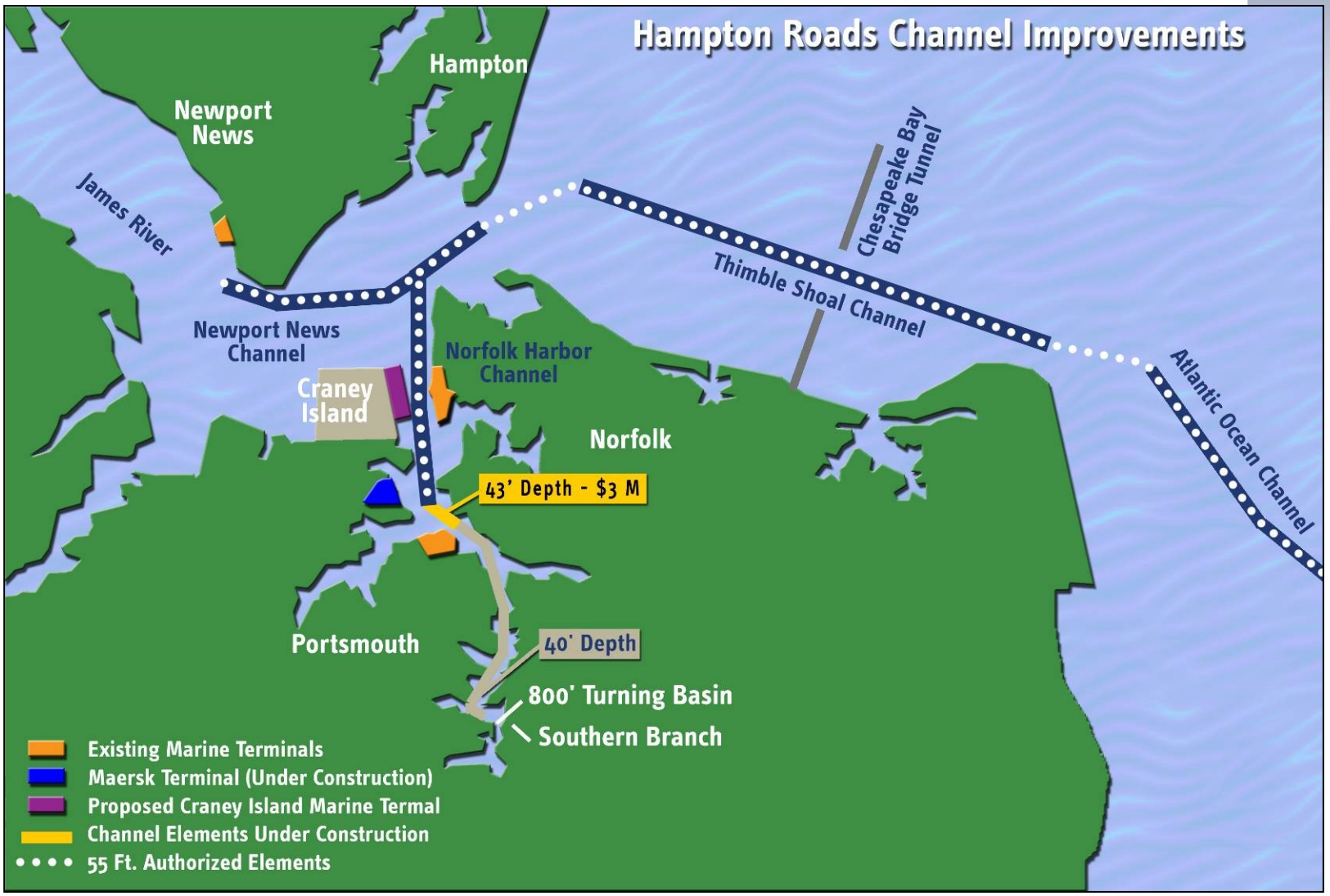
Craney Island Status Update

Milestone	Date
Revised Final Feasibility Report Package Submitted by HQ to ASA(CW) for Review & Approval	**August 2006**
Revised Final Feasibility Report Package, Draft Record of Decision, & Chief's Report Submitted by ASA(CW) to Congress	**October 2006**
Congressional Action to Authorize Project	**Subject to Passage of WRDA**

Craney Island
Marine Terminal Phase I - 2017

Craney Island Build-Out 2032

Channel Deepening



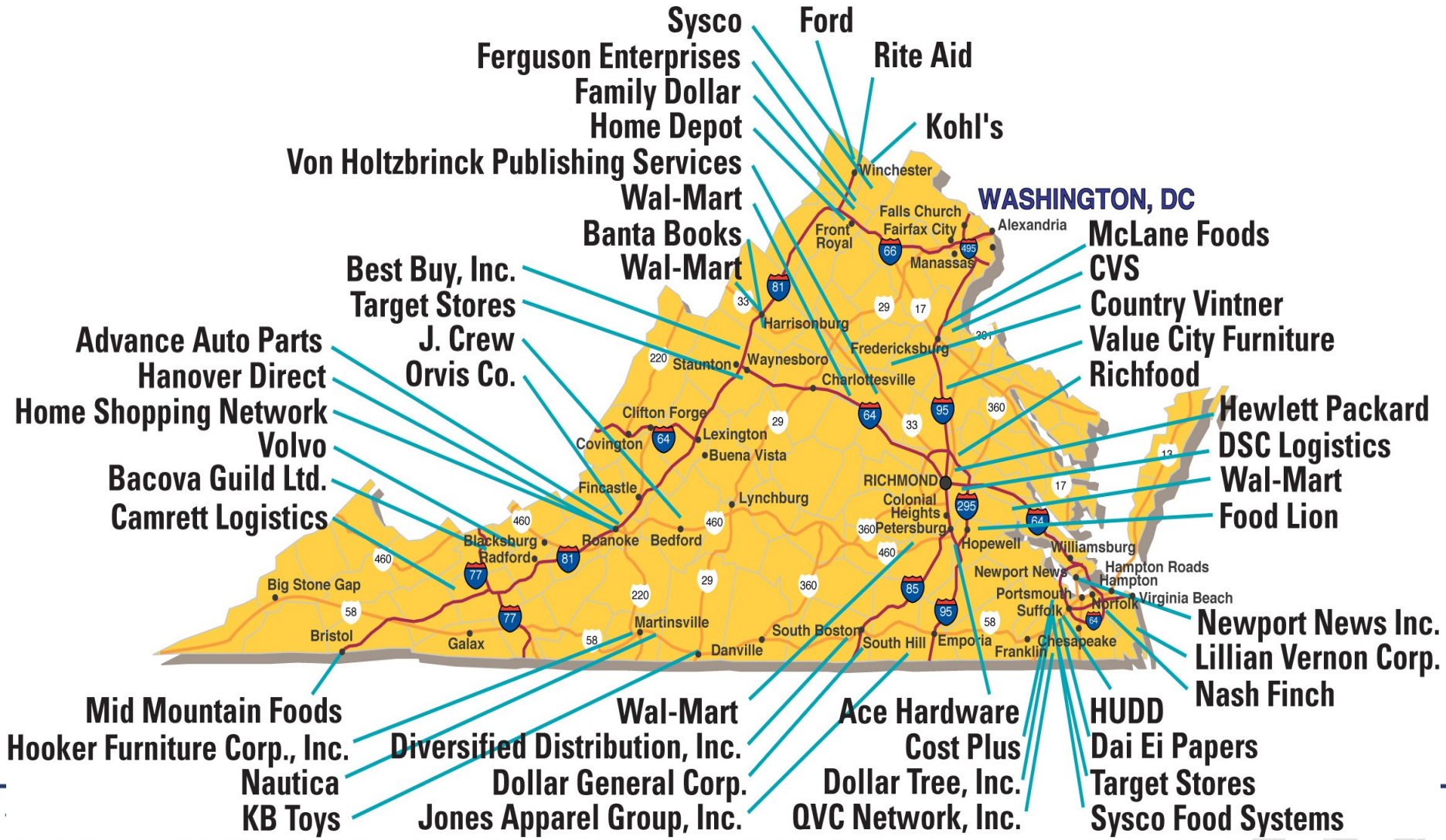
Inland Transportation Infrastructure

- **The 1.98 Million TEUs exported/imported from the Port of Virginia in 2005 were transported to inland markets using:**
  - **Barges (10%)**
  - **Rail (24%)**
  - **Trucks (66%)**

Source of Distribution of Traffic = Profiles

Distribution Centers

Over 80 Distribution Centers located in VA



Port Related Warehousing and Distribution in Central Virginia

- **DSC Logistics**
  - **DuPont, James River Logistics Center**
  - **Haverty's**
  - **Hewlett – Packard**
  - **The Sharper – Image**
  - **Value City Furniture**
  - **Wal-Mart**

Source: VPA Port Benefit Study 2005

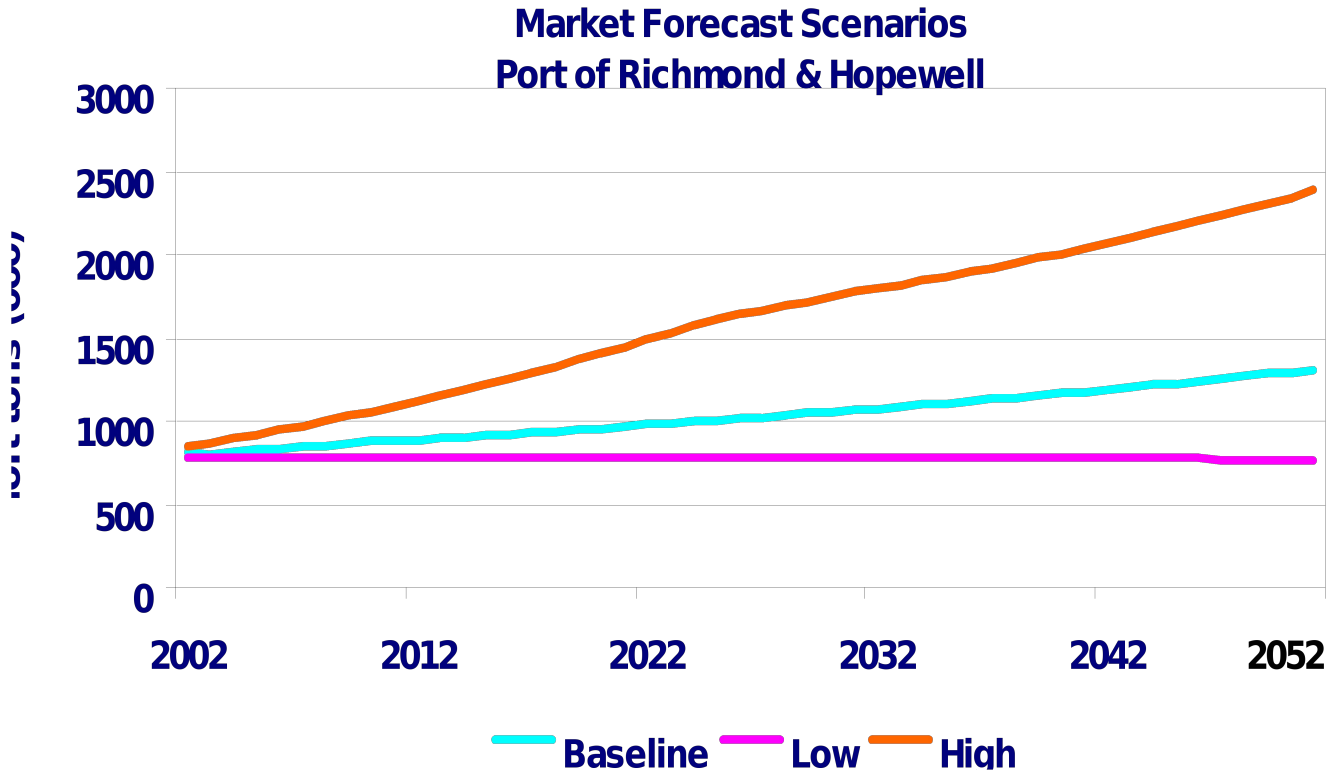
Port Related Warehousing and Distribution in Central Virginia

- **6.9 million square feet**
- **11,646 direct jobs**
- **$2.425 billion of investments**

Source: VPA Port Benefit Study 2005

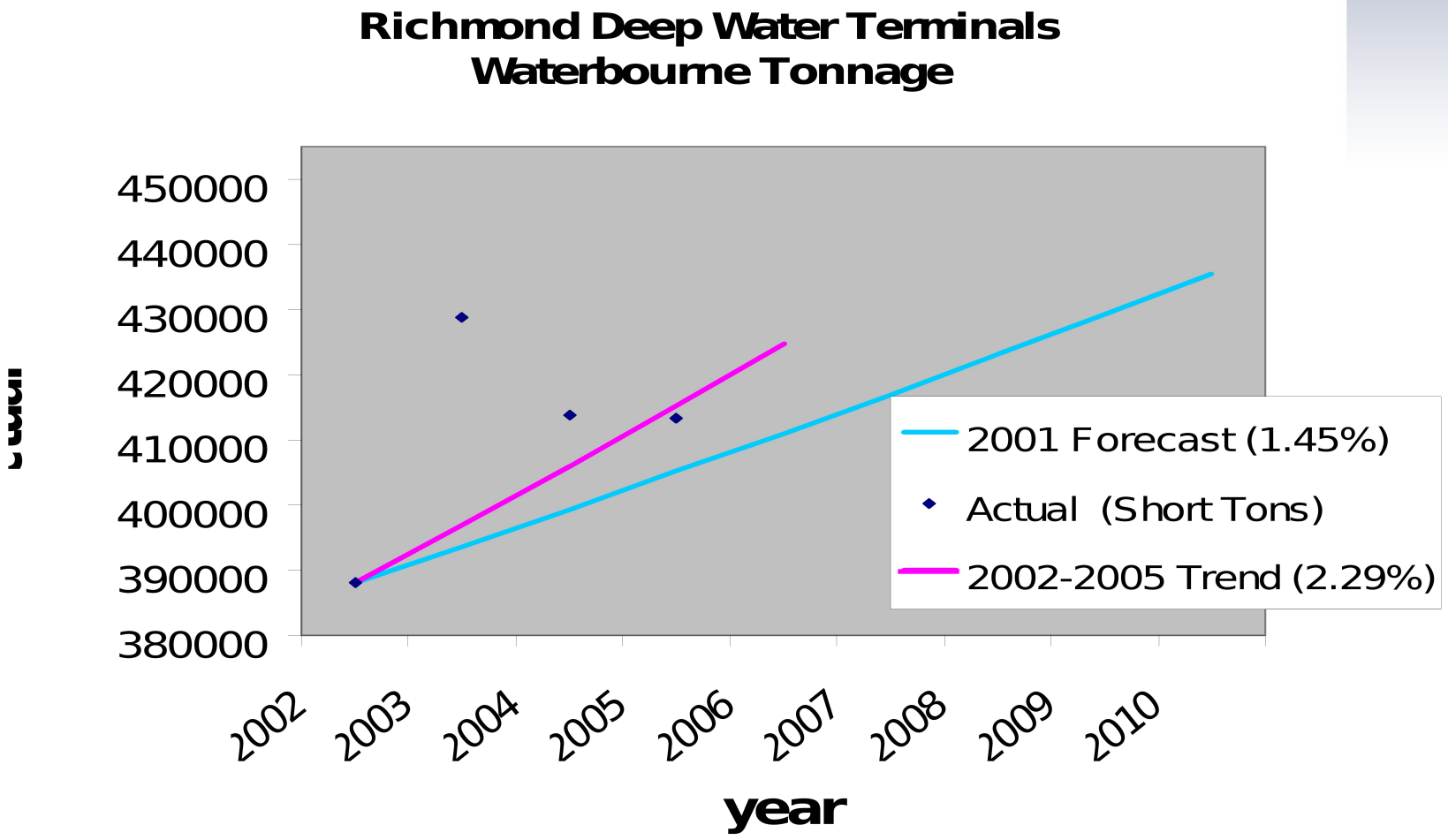
2001 James River Trade Forecast

Moffatt & Nichol Feasibility Study



- **Low forecast: 0.0%**
- **baseline forecast: 1.45%**
- **High Forecast: 2.9%**

Richmond Deep Water Terminals



Aid to Local Ports
Port of Richmond

- **Since 1997, the Commonwealth has awarded $1.475 million in grants to the Port of Richmond**

- **To date 91% of this funding has gone to support dredging in the James River and RDWT**

James River Partnership Model

- **Since it inception, the James River Partnership has served as a forum for communication between Federal and State agencies, The Virginia Pilots, and the Port of Richmond.**
- **The Port of Richmond and the James River Partnership are leading by example. Larger ports like the Port of Virginia are using this successful niche port program as a model for future navigation planning.**